



CAUSE CONNECTION

Connecting people who care to causes that matter

No Time like the Present to Update Your Estate Plan

August is national “Make a Will Month,” and the publicity surrounding this designation may prompt you to speak to your professional advisor to ensure your affairs are in good order. Even if you have already established an estate plan and executed corresponding legal documents, it’s always helpful to keep estate plans up to date and to review plans with your advisors on a regular basis.



Indeed, despite the many [cautionary tales](#) arising out of the Covid-19 pandemic, most Americans [do not have a will](#). It’s not only important to maintain a will to disperse assets to dependents and others, but also to carry out one’s charitable intentions through a bequest which is a provision in your will that designates a gift to a specific person or entity such as the Lehigh Valley

Community Foundation. In most cases, a bequest directs that a specific dollar amount, a percentage of your estate, specific property or the remainder of the donor’s estate be given, upon your death (or the death of you and your spouse).

Research reveals fascinating [psychological factors](#) behind a person’s decision to leave a bequest in the first place, which helps to understand the motivation for leaving a gift to a charitable organization in a will or trust. Not surprisingly, altruism has long been one of those factors. Bequests to charity are not a new idea. Examples of high profile estate gifts [date back centuries](#). Some of you may be familiar with the bequests of Benjamin Franklin, who established testamentary charitable trusts dedicated to supporting Boston and Philadelphia tradesmen, as well as a Pennsylvania-wide fund to support communities across the state. In fact, LVCF holds some of Benjamin Franklin’s bequest in a fund to benefit Northampton, Lehigh and Monroe Counties! Now, that’s the power of endowment and building a legacy beyond your lifetime!

Of the \$485 billion given to charity by Americans in 2021, according to [Giving USA](#), 9.5% of that giving came from bequests—that’s \$46 billion. Giving USA’s [data visualization tool](#) illustrates the ebbs and flows of bequest giving, which has long been a significant component of philanthropy.

Our team at LVCF welcomes the opportunity to work with you and your professional advisors to establish bequests to your funds at the community foundation through a will or trust or through a beneficiary designation on a qualified retirement plan or life insurance policy, including providing you with proper bequest language to ensure alignment with your intentions. We look forward to working with you to establish your philanthropic legacy.



IN THE NEWS

Marvin Webb and Tom Neuhaus Join LVCF Board of Governors

LVCF recently named **Marvin Webb**, MBA (he/him/his), Chief Financial Officer (CFO) at Funders for LGBTQ Issues in New York City to its Board of Governors. Marvin serves on the Foundation’s Community Investments Committee which oversees grantmaking. Marvin joined Funders for LGBTQ Issues in 2010 as Senior Vice President of Finance and Administration. He was recently named CFO and focuses on strategic finance, human resources, information technology, conference management, administration, and infrastructure. [More...](#)



The Foundation also named **Tom Neuhaus**, Vice President at Victaulic Company in Easton, Pa., to its Board of Governors. He serves on the Foundation’s Finance Committee. Tom has over thirty-four years of experience in various functions in industries ranging from industrial and commercial equipment manufacturing, energy, large-scale municipal power generation and distribution and building products. Companies he’s worked for over his career range from small, privately held entities to Fortune 50 multi-national public corporations. [More...](#)



CORE Fellowship Program Centers Equity in Capacity Building

Lehigh Valley Community Foundation (LVCF) has announced the inaugural cohort for its CORE Fellowship Program, a three-year capacity-building process designed to bring Lehigh Valley nonprofit leaders together to center equity in themselves, their relationships, their organizations, and the nonprofit sector.

“The CORE Fellowship Program combines our knowledge and experience gained through the past four years of LVCF’s Nonprofit Effectiveness program, as well as Project Equity, which was launched in partnership with the United Way of the Greater Lehigh Valley and Faces International in 2020,” explained **Megan Briggs**, Director of Community Investments. “The program design is built upon our past experiences and is informed by knowledge gained through interviewing former grantees and community leaders, researching national and regional best practices, and funding a local study.”

“LVCF is supporting this program through our unrestricted foundation-directed grant funding to fill funding gaps in the region and move progress on critical issues forward, said **Carrie Nedick**, Director of Donors Services. “We are incredibly grateful for this flexible funding. There are ways donors and fundholders can contribute, contact me at carrie@lvcfoundation.org.

“The CORE Fellowship program offers benefits to both the individuals in the cohort, but also their respective organizations,” said **Monique Moreno**, Assistant Director of Community Investments at LVCF. “The CORE Fellows will receive leadership development coaching along with guidance from organizational development consultants from [Partnering For Change](#) who will conduct an in-depth equity and organizational development assessment with time to carry out an equity-centered capacity-building project.” Fellows will also benefit from building connections to a network of nonprofit leaders. The CORE Fellowship offers a \$25,000 grant to each participating organization. Each will receive a \$10,000 general operating award during the first year, \$15,000 to support an equity-centered capacity-building project during the second year, and coaching support during the third year, contingent upon meeting program requirements.



Phyllis Alexander
Alexander Unlimited



Guillermo Lopez
G-peZ Consulting Services



Carter Gilbert
Independent Consultant

The Community Foundation is also partnering with local consultants who have served on the program design team which has co-created the launch of this program, they include **Phyllis Alexander**, Alexander Unlimited; **Guillermo Lopez**, G-peZ Consulting; and **Carter Gilbert**, independent consultant.



The following nonprofit leaders from their respective organizations will participate in the 2022-23 fellowship cohort:

Bradbury Sullivan LGBT Community Center

- Christina Graham, Data & Evaluation Manager
- Robin Gow, Cultural & Community-Building Programs Manager

Community Bike Works

- Dolores Singletary, Board President
- Hana Rose Cannon, Program Manager

Lehigh University - Zoellner Arts Center

- Candi Staurinos, Director of Community Engagement & Impact
- Mark Wilson, Executive Director

LINC (Lehigh Valley Interregional Networking & Connecting Consortium)

- Emilie Carlino, Manager, DEI and Partner Career Services
- Katelyn Mack, President & Chief Operating Officer

New Bethany Ministries

- Chris Cassidy, Director of Development & Planning
- Veronne Demesyieux, Associate Executive Director

Promise Neighborhoods of the Lehigh Valley

- Jeani Garcia, Program Manager Violence Prevention & Reentry
- Julie Thomases, Board of Directors

Ripple Community, Inc.

- Charlene Smalls, Board Member
- Sherri Brokopp Binder, Executive Director

SELF LV

- Brenda “Luna” Fernandez, Executive Director
- Enid Santiago, Board Chair

In addition to nonprofit leaders, six stakeholders representing the philanthropic, government, or corporate sectors will participate in the 2022-23 fellowship cohort. They include: **Janine Carambot Santoro**, Director of Equity and Inclusion, City of Bethlehem; **Mariska Van Aalst**, Public Engagement Officer, Congresswoman Susan Wild’s Office; **Meg Dowd**, Corporate Affairs Manager, JustBorn Quality Confections; **Carrie Nedick**, Director of Donor Services, Lehigh Valley Community Foundation; **Lissette Santana**, Corporate Communications, PPL Foundation; and **Marci Martinez-Howey**, Associate VP, DEI, United Way of the Greater Lehigh Valley.

Learn more about the CORE Fellowship Program and see photos of all the participants on the LVCF website. [More...](#)